

Please note that this record provides the statement of work (SOW) from the current contract to help enhance competition. This information should not be relied upon for proposal preparation. Contractors are cautioned to prepare their proposal in accordance with the SOW in the solicitation when it is released.

STATEMENT OF WORK

Marketing, Media and Educational Support for EPA's ENERGY STAR® and Other Voluntary Programs

1. INTRODUCTION

The Contractor shall provide full-service marketing, public/media relations, new media, advertising, educational outreach, strategic planning and evaluation, market research, and technical support services for Environmental Protection Agency's (EPA) Office of Air and Radiation (OAR), Office of Atmospheric Programs (OAP), Climate Protection Partnership Division's (CPPD) ENERGY STAR and other voluntary programs.

The Contractor shall provide all facilities, equipment, material, related administrative support, and qualified personnel required to perform tasks defined in this Statement of Work (SOW) and in accordance with written Task Orders issued by the Contracting Officer.

The Contracting Officer's Representative (COR) will be required to oversee the work on each Task Order and make all final decisions. The Task Order CORs will closely monitor progress to ensure that all work reflects the Agency's goals for pollution prevention. Upon completion of analysis, the EPA COR will make the final decision on whether to proceed and implement a particular project.

At no time will Contractor employees be assigned work space in EPA facilities. Contractor staff shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees, nor represent the views of the Federal government, EPA or its employees. The Contractors shall not engage in inherently governmental activities, including but not limited to determination of EPA policy, preparation of official EPA documents, or preparation of Congressional testimony.

The Task Order COR(s) will critically review and edit all Contractor products and deliverables. Each product or deliverable will be defined in a Task Order discretely for final review by the Task Order COR. This process assures that the COR provides significant input into the development of the final product. In addition, it is the responsibility of the EPA CO to assure

that Task Orders do not contain work that is considered policy-making on behalf of the Government.

2. BACKGROUND AND PURPOSE

EPA's Climate Protection Partnerships Division is responsible for an array of innovative, voluntary pollution prevention programs that reduce pollution by creating and expanding markets for clean energy, energy efficiency, energy efficient products, homes, and buildings. The primary goal of these programs, individually and collectively, is to reduce emissions of greenhouse gases and other pollutants through reduced energy consumption, and to focus on opportunities to increase energy efficiency and profitability at the same time.

This Statement of Work (SOW) covers marketing, public/media relations, new media, advertising, educational outreach, strategic planning and evaluation, market research, creative material development, and technical support services for the Division's ENERGY STAR Program. This program and all its related efforts are critical to EPA's role in accomplishing national greenhouse gas goals.

3. ENERGY STAR QUALIFIED PRODUCTS, HOMES AND COMMERCIAL BUILDINGS

The ENERGY STAR Program focuses on opportunities for improving energy efficiency and greenhouse gas reductions in the residential, commercial, and industrial sectors. The "universal" identifier for these products is the ENERGY STAR label, which distinguishes energy efficient products, homes, buildings and services from others in the marketplace. By centering the Program's marketing focus on a single label, EPA ensures that consumers can quickly and easily find products that help reduce energy costs while also reducing greenhouse gas emissions associated with energy use. As of late 2008, national aided awareness of the ENERGY STAR label stood at 75%, and is still increasing each year, due to broader market penetration of qualified products, partner efforts to promote the label, and EPA efforts to market and promote the program among consumers and businesses,

Beginning with the 1992 launch of labeled computers, the Program now includes a family of over 60 qualified products, over 1 million qualified homes, and tens of thousands of qualified facilities with broad participation across many industries. Products include both residential and commercial products across a number of product categories, such as appliances, heating and cooling equipment, home electronics, office equipment, lighting, commercial food service, etc. In addition to manufacturers, program participants include local utilities and utility groups, state agencies which promote energy efficiency, national and local retailers, home builders, home

improvement service providers, businesses, and other organizations committed to energy efficiency.

The program's marketing and communication efforts promote consumer/business awareness and demand for products, services and efficiency upgrades that meet ENERGY STAR efficiency guidelines. EPA, with the help of its Contractors, conducts marketing, communications and outreach to the general public, program partners, the media, and other audiences. These efforts have helped establish the ENERGY STAR brand as the national symbol for energy efficiency.

4. REQUIREMENTS

Services to be performed are:

A. Brand Management

The Contractor shall provide strategic brand management services to support consistent, accurate, and effective ENERGY STAR brand positioning to the marketplace based on existing ENERGY STAR brand guidelines, as well as support EPA in evolving the brand and brand guidelines to best meet both programmatic and marketplace needs.

Brand Management also includes relevant research, strategic planning, expert guidance, and creative support necessary to adequately guide the EPA on brand positioning and evolution. This may include maintenance/further development of brand identity guidelines, messaging, graphics, or other materials, as well as support in addressing brand issues identified by EPA.

The Contractor shall also conduct monthly logo monitoring and media analysis reports, which track all uses of the ENERGY STAR label in advertisements, POP displays, through print and Internet media. Reports shall include all tracked activities, detailed information about logo violations, and detailed media analyses.

B. Marketing Support

The Contractor shall provide strategic marketing and implementation support for the variety of ENERGY STAR offerings, including all labeled residential and commercial products/initiatives, new homes, home improvement and other home energy-efficiency practices, commercial and industrial sectors. Marketing support shall also include evaluation support and data analysis to measure effectiveness of individual marketing tactics, as well as overall program results. The goal of all marketing efforts is to increase consumer, business and industry awareness of the benefits of ENERGY STAR, and develop further industry support/active

participation leading to increased sales and other measures of program success in the marketplace.

Marketing support shall include, as relevant, any strategic marketing tactics, such as direct to consumer, web-based marketing, events, partner leveraging, etc. Marketing support shall also integrate, as relevant, niche marketing techniques that have demonstrated effectiveness among ENERGY STAR audiences, such as social marketing, grassroots marketing, partnership marketing, and marketing specific to customer segments, such as Hispanic and/or youth marketing.

Marketing support shall focus on these areas:

- (a) Marketing support and strategies for existing and new residential and commercial labeled products identified by EPA, including newly qualified ENERGY STAR products, e.g., smart meters, computer servers, etc. as well as products formerly managed by the Department of Energy such as appliances, Compact Fluorescent Lights (CFL's) and water heaters.
- (b) Marketing support and strategies for energy-efficient product practices/tips, such as the promotion of power management in computers and monitors, including outreach to organizations, marketing materials development, relevant research, and technical tools development.
- (c) Marketing support for ENERGY STAR commercial and industrial sectors, including strategic planning and implementation, creative, marketing and/or technical materials development, web content development, support for partner recruitment and recognition, event support, and relevant research, outreach to key organizations.
- (d) Marketing support for institutional purchasing, including strategic support, savings sales calculations and tools, outreach to stakeholders/purchasers, development of marketing materials/case studies, and other activities identified by EPA.
- (e) Marketing and promotional support for ENERGY STAR Home Improvement programs, including Home Performance with ENERGY STAR, Seal & Insulate with ENERGY STAR, ENERGY STAR HVAC Quality Installation, and others. Support may include, but is not limited to: performing demographic analyses, developing key motivating messages for targeted demographic groups, developing communication and outreach materials to promote ENERGY STAR recommended practices and services (including in the retail sector), and developing web-based tools and content.
- (f) Marketing and promotional support for the ENERGY STAR for New Homes programs, including ENERGY STAR for Homes Version 3, ENERGY STAR Concept Home, and Designed to Earn the ENERGY STAR. Support may include, but is not limited to: developing materials to support recruitment of builders and other program partners, developing consumer-

facing marketing and outreach materials, supporting local advertising partnerships and other initiatives, and developing web-based tools and content.

(g) Marketing and promotions support for ENERGY STAR's national campaigns, including strategic planning and support, marketing plan development and implementation, creative/technical and promotional materials development, web content support, dedicated partner outreach and support, team meeting and coordination.

(h) Marketing support for ENERGY STAR partner efforts to promote ENERGY STAR, including strategic guidance, creative and marketing materials development, vendor support, event support, retailer/partner/vendor analysis, development and implementation of specialized marketing and co-marketing campaigns, development and implementation of web marketing strategies, and other support identified by EPA.

C. Public/Media Relations Support

The Contractor shall develop and implement public/media relations strategies across all relevant areas of ENERGY STAR in addition to evaluation support and data analysis to measure effectiveness of individual public/media relations tactics, as well as overall program results. The goal of this support is to build national awareness, understanding, and relevance of (and ultimately loyalty to) ENERGY STAR among consumers for all of the ENERGY STAR programs, including residential and commercial products, new homes, home improvement and other home energy-efficiency practices, commercial and industrial sectors.

Media/public relations support shall focus on earned media among both consumer and business media outlets, as relevant, whether long-lead, newspapers, journals, trade press, web media, and/or other that are relevant for the specific ENERGY STAR programs listed above.

Media/public relations support shall also include "new media" such as social media (Twitter, Facebook), audio-visual podcasts, blogs, etc.) as well as risk/crisis communications to proactively protect the ENERGY STAR brand's credibility and support its maturity via all media and communications tactics.

Media/public relations support shall focus on these areas:

- (a) Strategic public/media relations guidance on overall program goals and objectives.
- (b) Proactive and/or opportunistic public/media strategies that anticipate/respond to interest in ENERGY STAR overall.
- (c) Support/facilitation of general media inquiries.

- (d) Strategic and integrated communications, media and public relations support for all ENERGY STAR program offerings that builds on accomplishments thus far, including existing and new ENERGY STAR labeled products or practices, new homes, home improvement, and commercial and industrial sectors, as well as any campaigns associated with these program offerings.
- (e) Development and implementation of public/media relations strategies across a broad spectrum of news outlets, including on-line, print, broadcast, and social media, as well as national, local, trade, long-lead, or targeted media.
- (e) Support for media/messaging integration, alignment, consistency, and coordination across all ENERGY STAR communications activities and program offerings.
- (f) Development of all required public/media relations support tools including fact sheets, backgrounders, press kits, web content, draft articles, media lists, charts/graphics/creative materials, videos, draft (multi-media) news releases, templates, and other tools and materials required to meet communications objectives.
- (g) Event support for all residential and commercial program offerings.
- (h) Support for ENERGY STAR's annual Partner of the Year awards.
- (i) Media training for EPA and other program stakeholders, including national, regional and local public/media training at EPA conferences, seminars and related events.
- (j) Public/media relations support for ENERGY STAR partners.

D. Advertising Support

The Contractor shall develop and implement advertising strategies across all relevant areas of ENERGY STAR in addition to evaluation support and data analysis to measure effectiveness of individual advertising tactics, as well as overall program results. The goal of this support is to build national awareness, understanding, and relevance of (and ultimately loyalty to) ENERGY STAR among consumers for all of the ENERGY STAR programs, including residential and commercial products, new homes, home improvement and other home energy-efficiency practices, commercial and industrial sectors.

Advertising support shall include both paid and public service advertisements (PSAs) among consumer and business media channels, as relevant, including Broadcast (TV, radio), print, web, outdoor, etc.

E. Marketing/Media Research, Analysis, and Tracking

The Contractor shall provide marketing and media research, analysis and tracking technical assistance to EPA for determination of strategy, or overall effectiveness. Support can include qualitative as well as quantitative studies for strategies, concepts, problems, creative focus, copy/concept testing, market segmentation studies or use of existing market data for analysis of tactics, targets, media selection, or other tools, as required.

- (a) Support and evaluation of EPA's marketing and energy-efficiency goals, including post media placement analyses, as well as assistance in analysis of local marketing, merchandising and promotional activity and sales incentive programs.
- (b) Conduct media research projects as specified by the EPA such as media penetration surveys, media allocation studies, copy testing and other industry standard research.
- (c) Develop, maintain and administer a media tracking system to measure media relations services performed under the terms of this contract with regard to effectiveness and cost efficiency.
- (d) Identify relevant energy, environment, business, utility, retail, media and consumer trends which affect EPA's communications and/or marketing goals, and make strategic recommendations about how these trends can support EPA's outreach efforts.

F. Other Relevant Services Integral to Communications Support

Creative Materials and Tools Development: The Contractor shall develop promotional, educational, communications, marketing and implementation materials and tools to market the ENERGY STAR and other voluntary programs and to support and recognize partner promotional efforts. The tools and materials shall include, but not limited to: print and web-based content, graphics, brochures, fact sheets, posters, program documents, program logos, presentations, partner templates, booth materials, promotional materials, reports, banners, displays, booths, kiosks, multi-media (video/audio-based and/or web-based) materials, and other materials identified by EPA.

Training Support: The Contractor shall provide all necessary training support both internal and external to EPA as relevant to any of the communications support roles defined within this scope of work. The goal of training support is to ensure that EPA ENERGY STAR staff as well as partners, contractors and other ENERGY STAR stakeholders are well-versed in relevant details related to position and messaging for the ENERGY STAR brand. As directed by the EPA Task Order COR(s), training support may focus on sectors, specific product areas, or specific partners/vendors, among other groups/audiences. The Contractor shall also help develop training resources for the ENERGY STAR website.

G. Management and Financial Interface

(1) Performance of work will be subject to task orders issued by the Contracting Officer. These Task Orders will provide details, specify desired completion dates, suggest possible lines of inquiry or otherwise complement the general scope of the contract.

(2) The Contractor shall maintain adequate communication with EPA to ensure proper planning and execution of EPA-determined advertising initiatives. This shall include briefings and other forms of information exchange such as telephone conferences. The Contractor will be required to provide conference reports after all major meetings/conferences. The Contractor will also be required to provide monthly progress reports that describe actions taken and summarized progress made toward goals, milestones, etc... The Contractor may also be required to maintain liaison with other EPA or Department of Energy officials and other support contractors.

(3) A cost per project systems is required. The Contractor must maintain a cost per project system which accounts for all costs for certain jobs such as production of advertising, direct mail, etc. This must be kept on a project basis in addition to total funding budgets.